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ABSTRACT

This guide is intended to help vocational teachers design and implement a cluster program in office occupations (clerical and secretarial, including word processing). The guide suggests teaching ideas for a program aimed at high school students, as well as those wishing to enter community college, university, or apprenticeship programs. To develop this curriculum guide, key occupations were identified, common core competencies for the clerical and secretarial cluster areas were determined, and the appropriate activities and resources were selected. The guide contains three sections. The first section describes the office occupations cluster organization and implementation, including goal-based planning, schedules, suggested courses, and program operation and management. The second section explains the instructional emphasis area, including suggested program goals and topics to be covered. A curriculum analysis matrix is provided. The final section of the guide covers student assessment. Appendixes to the guide include the following: Oregon manpower data; key occupation job descriptions; facilities, equipment, and supplies; and an office occupations skills record. (KC)

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OCCUPATIONAL CLUSTER GUIDE

OFFICE OCCUPATIONS

CLERICAL AND SECRETARIAL CLUSTERS

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OFFICE OCCUPATIONS

CURRICULUM GUIDE

SUMMER 1983

Verne A. Duncan
State Superintendent
of Public Instruction

OREGON DEPARTMENT OF EDUCATION
Salem, Oregon 97310

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FOREWORD

Leaders in business and industry expect high school graduates to be productive workers contributing to the economy and their chosen occupational fields. If high schools are going to meet the needs of students, education—especially for eleventh and twelfth grade students—needs to offer opportunities to develop skills for a broad range of occupations.

As taught in Oregon's high schools, occupational clusters are designed to prepare students for job entry. The Oregon Department of Education analyzed the basic elements of hundreds of jobs with similar characteristics, grouping these into occupational clusters. From the resulting list, Department staff, in cooperation with the Department of Labor, Division of Employment and Statistics, selected clusters geared toward current job opportunities around the state.

To develop this curriculum guide, key occupations were identified, common core competencies for the clerical and secretarial cluster areas were determined, and the appropriate activities and resources were selected. The guide suggests teaching ideas, and is aimed at high school students, as well as those wishing to enter community college, university or apprenticeship programs. It is intended to help the vocational teacher design and implement a cluster program in office occupations. In Oregon secondary schools these are classified as clerical and secretarial. They include word processing occupations and skills.

For further information, please contact H. Dean Herman, Business, Office and Marketing Related Programs Specialist at the Department of Education.

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A special note of appreciation is extended to the following individuals and organizations for their assistance, advice and recommendations: Lorrine Skaff, Margaret Stamps, the Oregon Alliance of Business, Education, and Labor and the Oregon Business Education Association, whose members responded to a survey during the development of the curriculum.

The final draft was prepared by H. Dean Herman, Specialist for Business, Office and Marketing Related Programs, Division of Vocational Education, Oregon Department of Education. Preliminary drafts of this publication were developed by Helen Lowe, Eastern Oregon State College, and Marilyn Johnston, Consultant, with program and course goals written by Burr Fancher, of Burr Fancher and Associates.

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Appreciation is especially given to all business education teachers in Oregon for their support during the development of this publication.

CONTENTS

Page

FOREWORD iii

ACKNOWLEDGMENTS iv

CLUSTER ORGANIZATION AND IMPLEMENTATION 1

- Goal-Based Planning for Office Occupations Programs 3
- Secondary Vocational Education Programs 5
- The Office Occupations Program 7
- Office Occupations Program Curriculum 9
- Suggested Curriculum Schedule 10
- Suggested Vocational Courses 11
- Suggested Allied Support Courses 14
- Program Operation and Management 15

INSTRUCTIONAL EMPHASIS AREAS 21

- Suggested Program Goals 23
- Program Goals and Course Goals for Clerical and Secretarial Programs 24
  - Career Development 24
  - Human Relations 26
  - Communication Skills 28
  - Computational Processes 31
  - Information Processing 33
  - General Office Procedures 37
  - Making Business Arrangements 41
  - Work Environment 42
- Curriculum Analysis Matrix 43

STUDENT ASSESSMENT 57

APPENDIXES 61

- A. Oregon Manpower Data 63
- B. Key Occupation Job Descriptions 65
- C. Facilities, Equipment and Supplies 67
- D. Office Occupations Skills Record 73

CLUSTER ORGANIZATION AND IMPLEMENTATION

GOAL-BASED PLANNING FOR OFFICE OCCUPATIONS PROGRAMS

Goals give purpose and direction when planning activities and they provide a common language for discussing the merits of activities as they are carried out. As a reference for planning, districts use state goals, district goals, program goals and course goals.

State goals describe what the Oregon Department of Education thinks a student should learn in public school. District goals describe what the local community and its schools think a student should learn in school locally, and how such learning relates to state goals. Program goals describe what local curriculum planners and teachers think a student should learn in office occupations and how such learning relates to district goals. Course goals describe what teachers think a student should learn in "Office Procedures," for example, and how such learning relates to program goals.

Competence Requirements

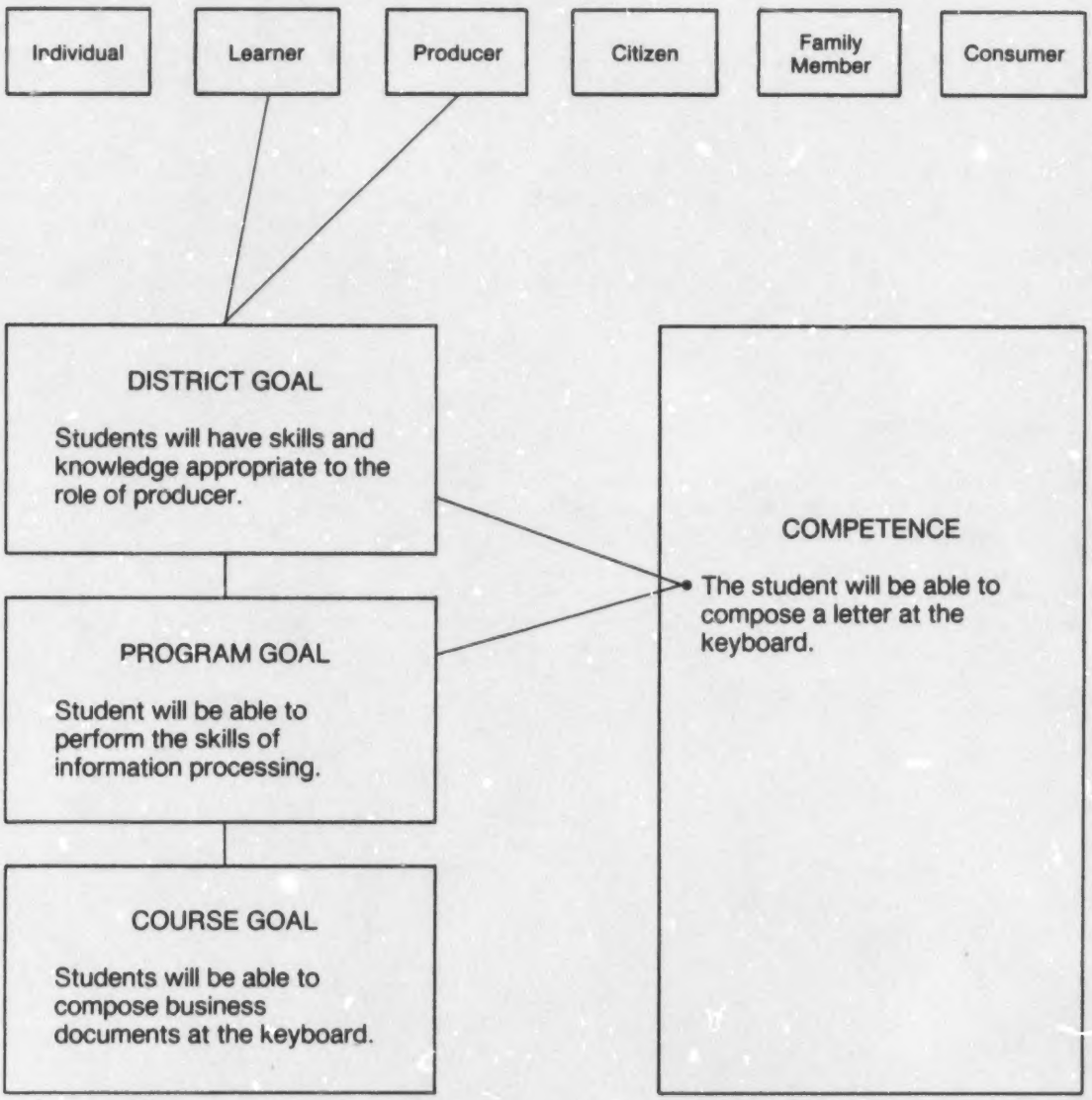
Competence is a separate but related part of goal-based planning. It is one of three graduation requirements. While districts plan and evaluate instruction by means of goals, requirements for graduation are based on credit, attendance and competence.

Competence means being capable, and students indicate competence by demonstrating their knowledge and skills. Districts verify student competence through the local list of indicators of competence (what many people have called "competencies").*

See chart on the following page:

* See Competence Guidelist, *Standards Guidelines: Competence Guidelist* (Salem: Oregon Department of Education, 1980), page 2.

For example, in office occupations:


Individual
Learner
Producer
Citizen
Family Member
Consumer
DISTRICT GOAL
Students will have skills and knowledge appropriate to the role of producer.
PROGRAM GOAL
Student will be able to perform the skills of information processing.
COURSE GOAL
Students will be able to compose business documents at the keyboard.
COMPETENCE
The student will be able to compose a letter at the keyboard.

Goals can be shared by teachers, administrators and others who are planning curriculum. It is important that office occupations teachers are directly involved in developing district, program and course goals so that their curriculum is coordinated with other subject areas.

SECONDARY VOCATIONAL EDUCATION PROGRAMS

Secondary schools in Oregon may offer two types of vocational education programs: an occupational cluster program or a special vocational program. Either program requires state approval if it uses federal vocational funds. The area of Office Occupations as presented in this guide includes two approved cluster programs—Clerical and Secretarial. Word processing has been treated as an integral function and skill within these two cluster areas.

Occupational Cluster Programs*

An occupational cluster program offers an approved family or "cluster" of logically related occupations. The relationship is based on "task inventories" which list identical or similar tasks performed in each of the key occupations in the cluster. For example, the approved clerical office cluster program provides instruction for nine key occupations:

computer programmer trainee
computer terminal operator
data entry clerk
file clerk
general office clerk
mail office clerk
receptionist/switchboard operator
typist-clerk
word processing specialist

Prominent occupations in the secretarial cluster include:

secretary (traditional)
word processing secretary

For a description of these occupations, see Appendix B.

The clerical and secretarial clusters which help to make up the office occupations program have a similar set of tasks which are required for performance in each of the above key occupations. "Reprographics," for example, involves the following tasks:

- Use effective formatting techniques in all methods of reprographics
- Prepare masters, select appropriate materials and operate equipment to duplicate materials:
  a. Spirit duplicator
  b. Mimeograph
  c. Heat sensitive duplication, such as a Thermofax
  d. Photocopier
  e. Offset
- Prepare paste-ups for photocopying
- Collate and staple duplicated materials
- Locate outside printing services
- Operate microfiche and microfilm reader and printer
- Determine most efficient and cost effective method of reprographics for a particular job

* Approved occupational cluster programs as of June 1983: agriculture, accounting, clerical, construction, electricity/electronics, foodservice, forest products, graphic communications, health occupations, industrial mechanics, marketing, metals, service occupations, secretarial.

THE OFFICE OCCUPATIONS PROGRAM

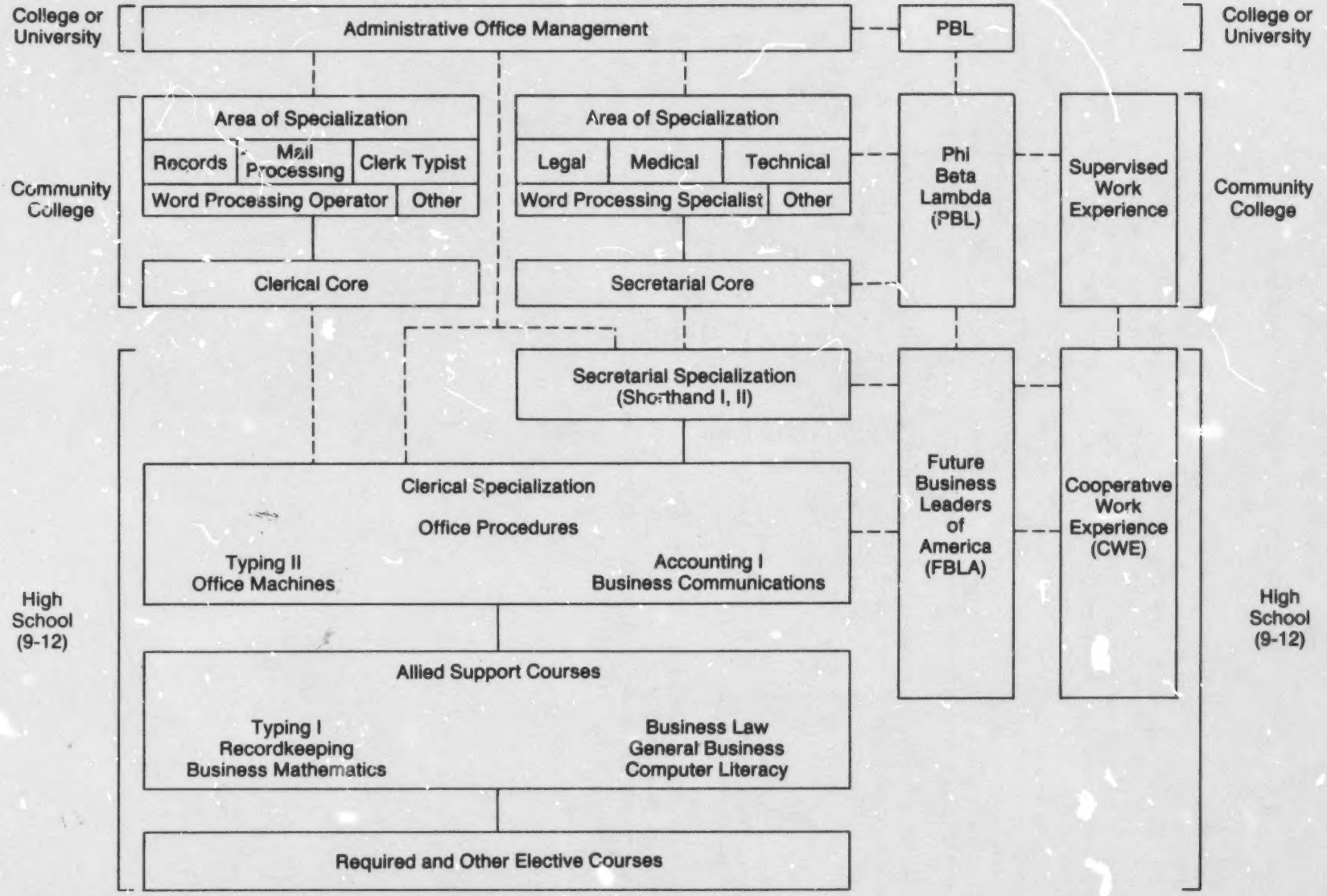
The Office Occupations program is designed for students who have made a tentative career choice in some area of administrative support, particularly in the more traditional areas referred to as clerical and secretarial. The chart on the following page depicts the focus of the office occupations program at each educational level. At the high school level, students will tend to follow a series of office occupations courses geared to a clerical base. Those course goals common to both clerical and secretarial occupations are described as the curriculum "core." Course goals that are emphasized especially for careers either in the clerical or the secretarial occupations are called "specialty" goals. Therefore, the basic curriculum in a complete office occupations program at the secondary level should, at a minimum, prepare students for entry-level jobs within the clerical cluster. Those students who wish to pursue a career in the secretarial cluster would also complete the appropriate specialty course goals. Students will then be able to further specialize their clerical or secretarial skills at a community college, college or university.

The Office Occupations curriculum offers students a wide variety of skills and introduces them to new theories and practices in the field, increasing their opportunities for initial employment and more rapid advancement. At the same time, it offers sufficient in-depth instruction in the related occupations to prepare students to enter advanced training programs for full-time employment in any one of the occupations.

Students should receive broad exposure to all the key office occupations. In addition, they should be encouraged to participate in a cooperative work experience program and the activities of a vocational student organization.

With planning, students in an office occupations program should be able to prepare themselves for an entry-level job, advanced vocational training or college entrance. Vocational instructors and guidance personnel should assist students in planning a total high school program.

LEVELS OF TRAINING FOR OFFICE OCCUPATIONS



OFFICE OCCUPATIONS PROGRAM CURRICULUM

This guide is designed to show teachers what specific knowledge and skills qualify students for entry-level employment (or postsecondary training) in office occupations. The teacher, with the help of an advisory committee, can organize a curriculum to instruct students according to individual needs.

An Office Occupations program should include:

Career exploration in grades seven through ten. This is the time for students to develop career goals and plans. Courses in general business, typing, business law, SUTOE (self-understanding through occupational exploration), an introduction to business class, personal finance/economics, and business English and communications all provide a foundation for the office occupations program.

Occupational guidance. Guidance helps students learn more about themselves, and helps them choose challenging and fulfilling occupational fields.

Vocational courses. Courses which offer the core of knowledge needed for successful performance in office occupations. Through these courses, the student will be able to acquire the experiences outlined in the course goals. (See page 11 for a list of recommended vocational courses.)

Allied support courses in grades 11 and 12. Students should be offered supplemental courses to sharpen particular interests and talents, and help them attain occupational goals. Examples of allied support courses would be business law, consumer economics, typing, business math and psychology.

Cooperative work experience. On-the-job training can help improve career decision-making skills. Work experience can be considered an elective which will fill part of the required time block.

Projects. Projects are individually designed laboratory learning experiences similar to on-the-job training. They may be used in lieu of cooperative work experience in situations where community resources cannot provide suitable training stations for all students.

Co-curricular activities of the Future Business Leaders of America (Oregon Chapter of FBLA). FBLA is recognized as an integral part of the office occupations program. The purposes of FBLA are to promote vocational understanding, awareness of civic responsibilities and leadership skills. Chapter activities relate directly to employment needs for business occupations.

A suggested Office Occupations program curriculum is presented on the following page.

SUGGESTED CURRICULUM SCHEDULE

Period	Grades 7 and 8	Grade 9	Grade 10	Grade 11	Grade 12
I	Language Arts	Language Arts	Language Arts	Language Arts	Government/Civics
II	Social Studies	Mathematics	Personal Finance/ Economics	Social Studies/ History	Office Procedures
III	Mathematics	Health or Physical Education	Health or Physical Education	Allied Support Courses	
IV	Health and Physical Education	Science	Office Occupations Exploratory Course**		Any combination of: •Allied Support Courses •Vocational Courses •Coop Work Experience or Project
V	Science or General Music	Typing I	Allied Support Courses	Vocational Courses*	
VI	Career Elective	Allied Support Course (i.e., Orientation to Bus. Ed.)			

Required Courses (including graduation requirements)

Vocational Courses (such as: Office Procedures, Bookkeeping/Accounting I, Office Machines, Typing II, Shorthand I & II, Business Communications, or Cooperative Work Experience)

Allied Support Courses (such as: Orientation to Business Education, Business Mathematics, Computer Literacy, Recordkeeping, General Business, Business Law, Speech, Psychology, Typing I, Briefhand and Notehand)

* Orientation to Business Education is a nine-week course for ninth grade students which provides an overview of career options within the areas of office, accounting, marketing and management.

** From this exploratory course, students will select the direction for further specializing within the occupational core and specialty courses.

SUGGESTED VOCATIONAL COURSES

Vocational clusters are designed around the skills, knowledge and attitudes which are common to a group of related occupations. A vocational cluster program will be approved based upon the vocational program and course goals being offered. Secondary schools most often use the following course titles to "package" these course goals.

Vocational Clerical/Secretarial Courses

Capstone Course:	Office Procedures
Clerical/Secretarial Core:	Typing II
	Office Machines
	Business Communication
	Accounting I
Secretarial Specialty:	Shorthand I & II

Allied Support Courses

Allied support, or pre-vocational courses are those related courses which prepare the student for and contribute to the vocational courses, but are not considered part of an approved vocational program. Business-related support courses include:

Typing I
Business Law
Recordkeeping
Business Mathematics
General Business
Introduction to Computers (Computer Literacy)

VOCATIONAL COURSE DESCRIPTIONS

Office Procedures (year)

Office Procedures is often referred to as the "capstone course" of an office occupations program because it ties together the knowledge and skills acquired in other business courses. It also introduces the student to new, related subject matter, adding to his or her competence as a future office employee.

Office Procedures should establish a link between school and business, and should, therefore, include all information, procedures and equipment typically used in an office. This includes training in word and data processing, mailable letters, letter writing, calculating machines, mail and shipping services, filing and records management, reprographics, financial records, telephone techniques and transcription. The course also includes job application and career information, emphasizing the development of productive attitudes and work habits.

Instruction may be provided through traditional classroom techniques, individualized instruction (open lab), model office, office simulation or a combination of these approaches. The course should be used as the related classroom instruction for office occupations students participating in cooperative work experiences. For those students, classwork is correlated with actual experience in a business office. Usually students spend half the school day in classes and the other half in an office. Classwork concentrates on office occupations skills and procedures, although additional work may be assigned to students in specific areas where job performance shows a need for it.

Typing II (year)

In advanced typewriting, students develop employment skills. Production work is the major emphasis of the course, and includes typing manuscripts, stencil and spirit masters, programs, minutes of meetings, statistical tables and business forms. Students learn to dictate at the typewriter and correct errors. They perfect their typing skills through assignments that are typical of actual office work.

Office Machines (semester)

Schools can teach machine skills several ways. One is to offer a separate office machines course. Another approach is to teach these skills in other courses such as office procedures, business math and advanced typing. A third alternative is to offer office machine instruction in a skills laboratory with individualized teaching.

As a separate course, Office Machines teaches students to solve business problems by using various business machines such as the electronic calculator, reprographic equipment, dictation/transcription equipment and word/data processing equipment.

Business Communication (semester)

Business Communication emphasizes grammar and writing for business letters. Students should also study the various types of oral communications, including listening, speaking, dictation and telephone techniques, as well as the process and theory of communication, nonverbal communication, reading for comprehension, proofreading and editing.

Bookkeeping/Accounting I (year)

Bookkeeping/Accounting I gives students experience maintaining financial records, along with interpreting and analyzing them. Practice sets with business papers may be used to emphasize record management. Instruction in the application of electronic data processing may also be integrated throughout the course. The fundamentals and terminology of accounting are emphasized.

This course usually includes the basic methods of computing, classifying, recording and maintaining numerical data involved in financial and product control records, including the paying and receiving of money. Career objectives related to bookkeeping and accounting are identified and discussed.

Shorthand I (year)

Shorthand I covers the theory of shorthand, emphasizing reading and writing skills, dictation and transcription. During the second semester, students increase their note-taking speed and learn to transcribe mailable letters on the typewriter. The course integrates shorthand, typing and language skills.

Shorthand II (year)

Shorthand II is designed for secretarial students who want further shorthand skills. Speed building and typewritten transcription of mailable letters usually are the two most important units following a review of shorthand theory. Emphasis is placed on the production of letters according to office standards. Students may also practice taking dictation using letters of increasing difficulty and length.

Cooperative Work Experience

The term "cooperative" refers to the working relationship between office occupations participating businesses and local schools. Office occupations instructors and employers work together to develop on-the-job learning experiences which will reinforce classroom instruction. Students are awarded credit for these experiences. Employers help coordinate on-the-job activities and supervise trainees. Students, teachers and employers plan and evaluate the program on a regular basis.

The office occupations instructor and employer outline individual student's responsibilities and training experiences on the job in a written document called a training agreement. Job experiences are coordinated with classroom instruction and opportunities are identified for the student to apply curriculum on the job. The agreement is usually signed by the employer, student, teacher, and parents or guardian; it requires school approval. A written learning program known as a training plan details the tasks to be learned by individual students, and may suggest learning activities for each task. Plans serve as a structure for learning experiences and can also help in evaluating student progress. Plans can be maintained by students to help them develop a sense of responsibility for their own progress.

SUGGESTED ALLIED SUPPORT COURSES

The following allied support courses are recommended for students enrolling in an office occupations cluster curriculum.

Although course titles may differ, high schools provide many of the opportunities explained in the following descriptions. Students need to consider all available courses and discuss various alternatives with a parent, school counselor or office occupations advisor.

Business

The most common support courses for the office occupations students are those frequently included within business education. Business law, general business, orientation to business occupations, recordkeeping, office occupations exploration and typing are strongly recommended. Others include consumer economics, personal finance and briefhand or notehand.

English

Courses which strengthen speaking, listening, reading and writing skills, with emphasis in spelling, punctuation and sentence structure would be beneficial to the student. Such courses might include journalism, creative writing, speech or drama and business communications.

Mathematics

Mathematics courses which emphasize problem solving are strongly recommended. Although they depend on the level and needs of the student, they should include gathering, organizing and presenting data, recognizing or defining the problem, choosing problem-solving strategies, estimating, approximating, predicting and computing. Computation skills should include mental arithmetic, written activities and the use of calculators and computers. Depending on the level and needs of the student, courses such as refresher, applied, consumer or business math might be helpful.

Social Studies

Courses which provide students with a better understanding of themselves and others, business environments, the private enterprise system and economics generally would be beneficial. Examples include psychology, individual and group behavior, modern problems, economics and government, particularly for those students entering occupations which involve legal office occupation settings.

Sciences

Courses which introduce scientific concepts would greatly aid students entering careers in the medical office occupations. Such courses include biology and chemistry.

Fine Arts

For those students pursuing office careers in occupations involving fashion, design, advertising, or similar creative fields, such courses as home economics (textiles, fashion design, tailoring), graphic design, art, drafting and commercial art might prove helpful.

For students interested in advanced education or in international business settings, foreign languages such as German, Japanese, French or Spanish would prove beneficial.

Other Vocational Programs or Courses

Some students may have occupational objectives which overlap into other vocational programs. They may want to take courses in more than one cluster area. For example, a student who is interested in a career as a medical secretary may also choose to enroll in a health occupations cluster course. A student wishing to become a technical secretary may choose to enroll in an electronics cluster course. This interrelationship increases the student's options and may help to eliminate unnecessary curriculum duplication.

PROGRAM OPERATION AND MANAGEMENT

A successful office occupations program combines a variety of elements, including in-school learning, actual work experience and participation in a vocational student organization. The following is a brief description of these elements.

IN-SCHOOL INSTRUCTION

Office Simulation

Office simulation involves organizing the classroom as an office, with students operating a fictitious company. The simulation materials are often commercially prepared packages with forms and assignments. The office students are assigned positions in the company, depending upon individual abilities and interests. A work flow is established and maintained to simulate office functions. Students can be promoted to other positions in the "company" or transferred to other departments. In an office simulation, the teacher acts primarily as a manager.

Model Office

In a model office situation, the students work in an actual office operation. Office work is generated from sources within the school such as other teachers or outside business organizations, usually nonprofit. Students in the model office are assigned positions depending upon the organization of the office and their individual interests and abilities. Work flow is established by processing the incoming work orders. Students can transfer to other positions within the model office, either to other production areas or to a managerial level. The teacher's role is to oversee the operation of the model office.

In-Basket

The in-basket represents the materials an office employee would use on the job. Such a simulation is designed to allow each student to work independently. Although there is no work flow in the simulation, the in-basket does give students experience in setting priorities and making specific decisions. The student is faced with a number of tasks representative of a particular office position. For example, the in-basket might feature tasks that a general office clerk would face. After becoming familiar with the overall functions of the office, the student would then examine each task and decide which should have top priority.

Learning Activity Packet (LAPS)

The learning activity packet or "LAPS" method of instruction usually involves individually paced learning. Students are given a kit or packet containing unit objectives, study materials, learning activities and self-tests. They work through the kit at their own learning rates. Sometimes several students work on a LAP together. Although commercially prepared versions are available, many learning activity packages are prepared by teachers.

Incident-Process (Case Study) Method

The incident-process or case study method is especially useful to teach students how to obtain facts necessary to make decisions. Students are given a series of problems concerning a business but only a minimum amount of related information about the nature of these problems. Before making any decisions, they must obtain additional information from the teacher, group leader or other designated person. Students are able to make valid decisions only after getting pertinent information.

Learning-Systems

The learning-systems method (multimedia presentation) organizes materials into a package including cassette tapes, video tapes and films. Whether teacher- or commercially-prepared, these have been especially effective learning tools.

Individualized Instruction

Individualized instruction requires that the instructor play a different role, becoming a counselor and a director to help guide the student and answer questions on an individual basis. Occasionally it is necessary to lecture to the whole class, or hold small-group seminars and discussions. Maintaining a record of the student's progress is also an important function of the instructor.

An inservice program will orient instructors to these new roles and to the most effective ways of establishing and directing individualized instruction. Any program of individualized instruction should:

give credit for previously learned and demonstrated skills.

allow students to pause for remedial assistance and then resume their studies.

inform students what will be expected of them.

allow students to progress at their own rate, keeping in mind the needs of special students, as identified by the special education staff.

monitor each student's progress.

Interdisciplinary Approaches—Team Teaching

In order to teach the many aspects of office skills, it may be wothwhile to work with other teachers. For example, the office occupations and math teachers can switch classes: math students will learn about electronic calculators and office occupations students will learn calculation techniques. The home economics teacher can teach grooming for an office environment and the office occupations teacher can explain job application techniques.

COOPERATIVE WORK EXPERIENCE

The term "cooperative" describes the working relationship between school and business in preparing students to enter and succeed in their chosen career fields. Both the office occupations instructor and the participating employer have instructional responsibilities. These instructional responsibilities must be jointly planned and coordinated if the instructional program is to be effective.

The emphasis must be on instruction and training. If on-the-job activities are provided primarily for other reasons—financial assistance, inducement to remain in school, or as an alternative for unresponsive students—the overall purpose may no longer be achieved and should no longer be labeled as vocational education utilizing the cooperative method. In such situations, the arrangement should be labeled as general work experience.

Training Agreement

The office occupations instructor and training sponsor plan each student's program to coordinate classroom work with job experience. An agreement is usually signed by the employer, student, teacher and parent or guardian; it requires school approval.

Training Plan

A training plan details the students' goals and may suggest learning activities for each. This plan serves to structure learning experiences and can help a teacher evaluate the students' progress. Students can maintain their training plans, thus developing a sense of responsibility for their own progress.

The Project Method

If students are under the minimum legal age for employment, or if there are no positions available, projects can be designed to coordinate with regular classroom instruction. These can include student observation of local offices, conducting and analyzing surveys related to office occupations, skills development and career planning.

VOCATIONAL STUDENT ORGANIZATION

Future Business Leaders of America (FBLA)-Phi Beta Lambda (PBL)

FBLA-PBL is a nonprofit, school-based organization designed to promote leadership. It integrates student activities for secondary (FBLA) and post-secondary (PBL) business education students with instruction, offering awards and scholarships, career development conferences, leadership training and educational projects. It is a valuable instructional tool through which students can meet many course goals.

FBLA-PBL is organized into local, state and national chapters. At the local level, students organize chapters and elect student officers; a business instructor serves as chapter advisor. All local chapters in the state are chartered by and comprise a state chapter of FBLA-PBL; national FBLA-PBL is composed of state chapters with national officers elected by the state chapters.

Participation in a vocational student organization should be considered an integral part of the business education curriculum since it provides opportunities for students to expand their knowledge of business through service projects and business-related activities. Equally important, it offers an opportunity for young people to improve their interpersonal relationships, skills and leadership abilities. These are skills students usually do not learn in a classroom.

ADVISORY COMMITTEE

As programs develop, advisory committees consisting of business representatives can offer expertise that instructional staff may not have. They may be individuals who have hired students from the program, line supervisory personnel, owners of small business or managers. They should show an interest and willingness to contribute to the development of the program.

Committee members:

advise on course content; help obtain display materials and equipment; and provide resource speakers, trade materials and occupational information.

help establish program entrance standards.

act as liaison between school and the business community.

help organize cooperative programs.

identify training stations; recommend job rotation, help determine criteria for measuring student performance.

work with labor and management to foster cooperation; help graduates get jobs.

The Department of Education has materials to assist you in establishing an advisory committee.

CAREER GUIDANCE

Career guidance is the combined responsibility of the counselor and teachers. Both should utilize all opportunities to relate instruction to office occupations: work experience, resource speakers, field trips and individual student research.

PROFESSIONAL STAFF DEVELOPMENT

Most office occupations teacher-coordinators are graduates of a teacher training institution (combining educational training with related work experience) or are recruited directly from business, with experience in one or more office position. They must know how the program is structured, and have management and planning skills as well as career guidance training.

Teachers can add to their skills in several ways. One approach is through the supervised occupational internship program which allows teachers to work during the summer under a training plan agreement for pay and graduate credit. In addition, involvement in a professional teachers organization, particularly the Oregon Business Education Association (OBEA), affiliated with the Oregon Vocational Association (OVA), can help teachers keep up with the latest business and office trends, and communicate with other teachers.

PROGRAM ASSESSMENT AND PLANNING

Program assessment involves the analysis of each element of the office occupations program in order to identify priorities for improvement, develop long-range plans and plan a budget. Annual assessment can be a way to measure the effectiveness of the program and to involve school

administrators and advisory committee members in program development. A booklet which explains the assessment process and identifies the elements of a model office occupations program may be obtained from the Department of Education.

Information from the assessment can be used to establish priorities for further program development based upon a program model. In order to meet these needs, activities are planned, such as purchasing specified equipment, tearing out a partition or organizing an advisory committee. Not all priority needs can be met in one year.

A long-range plan can relegate certain expected accomplishments to future years. For example, it may not be feasible to develop a complete model office facility immediately; it may need to be done in stages over a five-year period. Activities prescribed for year one will be itemized and the plan will provide for future revision. New priorities will emerge as the assessing and planning process is repeated periodically. To illustrate: the annual report to the advisory committee of activities and accomplishments could be based on a reassessment of the program. Data from the reassessment is used to support goal accomplishment. This management-by-objective process is well understood by members of the business community.

INSTRUCTIONAL EMPHASIS AREAS

SUGGESTED PROGRAM GOALS

Listed below are the program goals from which course goals are organized:

1. Students will be able to plan, enter and advance in an office occupations career.
2. Students will be able to apply habits and work attitudes needed for success in obtaining employment, retaining jobs and advancing in their occupations.
3. Students will be able to use appropriate skills in business communications.
4. Students will be able to solve business problems using computational skills.
5. Students will be able to perform information processing tasks.
6. Students will be able to follow general office procedures.
7. Students will be able to arrange appointments, meetings, conferences and travel for business staff.
8. Students will be able to establish and maintain an appropriate work environment.

These goals are designed to help the student develop skills and knowledge in the office occupations. Office occupations programs are not synonymous with courses titled typing, business math, clerical office procedures or office machines. Such courses are specialized and limited in scope. Office occupations programs offer a broad range of opportunities to develop skills and knowledge in the key occupations of the clerical and secretarial cluster areas.

In each of the emphasis areas which follow, suggested course goals and learning activities are designed to help instructors develop office occupations programs.

PROGRAM GOALS AND COURSE GOALS FOR CLERICAL AND SECRETARIAL PROGRAMS

(C) Clerical only
(S) Secretarial only
All others are common to both Clerical and Secretarial

1. CAREER DEVELOPMENT

Program Goal: Students will be able to plan, enter and advance in an office occupations career.

Course Goals: Students will be able to:

Career Planning

1.1 assess their interest, aptitudes and abilities in relation to career goals, career requirements and lifestyle preferences.

1.2 describe the career ladders for advancement within each of the key occupations.

1.3 utilize community resources for analyzing jobs and careers.

1.4 apply decision-making skills in making career choices.

1.5 identify entrepreneurial opportunities in making career choices.

Job Seeking

1.6 identify primary sources of information on job availability.

1.7 complete a personal resume/data sheet on qualifications for employment.

1.8 write a letter of application for employment.

1.9 dress and groom appropriately for job interviews.

1.10 complete employment application forms.

1.11 complete testing procedures required by prospective employers.

1.12 use appropriate interviewing skills.

1.13 describe legal aspects of hiring, including both employer and employee rights.

Job Retention and Growth

1.14 conduct a self-evaluation of personal traits, work attitudes and career goals.

1.15 evaluate jobs.

1.16 assess compatibility of personal and career goals.

1.17 conduct self-appraisals of job performance.

1.18 explain the need to keep current on technological advancements through continued education and training.

Activities Have an FBLA member invite a guest speaker to talk about office occupations, the function of clerks in the industry, and the relationship of an office occupations position to the structure of a business operation.

Review organization charts for various businesses to determine the relationship of clerical positions to the structure of the organizations.

Have students chart a personal four-year plan for their careers, including training and educational options.

Have students invite a member of the business advisory committee to class to talk about advancement opportunities for office workers.

Have students survey adults and other friends about their work.

Have students interview individuals in the business community to learn how they selected that career, and what makes them feel suited for it.

Have students invite a personnel manager, business advisory committee member or cooperative work experience employer to discuss interviewing techniques, job applications, regulations and forms with the class.

Have students practice completing work permits, social security applications, W-2, W-4, and sample employment forms which have been collected from local businesses.

Have a student receptionist arrange to have a personnel manager talk to the class about common errors on job applications and resumes.

Have cooperative work experience students interview a personnel manager to learn such company policies concerning evaluations, vacations, company benefits, promotions, absence and tardiness.

Videotape mock interviews between students and a member of the advisory committee.

2. HUMAN RELATIONS

Program Goal: Students will be able to apply habits and work attitudes needed for success in obtaining employment, retaining jobs and advancing in their occupations.

Course Goals: Students will be able to:

Personal Traits

2.1 apply acceptable grooming and hygiene habits.

2.2 apply efficient and productive work habits including:

- time management
- work flow management
- punctuality
- regular attendance
- thoroughness
- teamwork
- neatness
- initiative
- self-evaluation

Work Attitudes

2.3 apply a positive attitude toward work.

2.4 deal with job stress and conflict.

2.5 promote a positive business image with clients.

2.6 show respect for authority.

2.7 show respect for property.

2.8 demonstrate respect for co-workers.

2.9 accept and give constructive suggestions and praise as related to job performance.

2.10 accept results of performance appraisals as positive steps for improvements in job role.

2.11 apply ethical behavior in the performance of work assignments:

- honesty
- loyalty
- confidentiality

2.12 originate work.

2.13 apply ability to cope with change.

Activities Have Cooperative Work Experience students discuss communication habits that are pleasing and help in human relations. These include talking with a pleasant voice, listening attentively and not interrupting others. Students should use case studies from their offices if possible.

Have an "office day" and have students come to school dressed appropriately for an office job.

Have a style show of appropriate business attire.

Install a full-length mirror in the classroom and post a checklist beside it.

Invite an efficiency expert from a local business firm as a guest speaker.

Have students write a case problem relating to personnel from situations that have happened on their jobs, or on a parent, relative, or friend's job. Select several for class discussion.

Show and discuss the filmstrip/record, "Your Attitude is Showing" (filmstrip and book) by Chapman, SRA, 1090 Wionna Avenue, Cincinatti, OH 45224.

Have each student keep a journal of how and when they observed someone lose self-control, either in real life or in a TV program situation. Discuss this behavior to determine what could have been done in each situation.

In small groups or individual writing assignments, have students describe an enthusiastic person and discuss what makes an individual feel that way.

For one week, have students keep a journal of criticisms and compliments they received and how they reacted to each.

Give students various statements in which a supervisor criticizes an employee, and ask students to write how they would reply to each situation in a positive way.

Invite a panel of business people to discuss business ethics as they apply to both workers and employers.

3. COMMUNICATION SKILLS

Program Goal: Students will be able to use appropriate skills in business communications.

Course Goals: Students will be able to:

Language Skills

3.1 punctuate and capitalize correctly.

3.2 apply spelling rules.

3.3 use grammar that is correct and appropriate to business communications.

3.4 divide words correctly.

3.5 use appropriate business vocabulary.

3.6 use numbers correctly.

3.7 write legibly.

3.8 use the following reference sources:

- thesaurus
- secretarial handbooks
- zip code directory and other postal information
- almanac
- atlas
- professional/trade publications
- company handbooks or procedures manuals
- telephone directory
- *Oregon Blue Book* and related government/public resources
- catalogs
- library
- equipment manuals

Basic Verbal/ Nonverbal Skills

3.9 read with speed and comprehension.

3.10 write business letters, memorandums and reports.

3.11 speak effectively in meetings and discussions.

3.12 listen effectively.

3.13 use nonverbal communications effectively:

- body language
- voice inflection

Proofreading and Editing

3.14 use proofreading marks to indicate needed corrections.

3.15 identify errors in typing, grammar, spelling and word usage.

3.16 edit and revise text on hard copy or CRT.

Activities

Have students write letters of application and resumes in response to want-ads for jobs in which they are interested.

Have students conduct a panel discussion based on research they have gathered about clerical equipment. These include word processors, computer console input typewriters, automatic typewriters, electronic mail, telecommunications, reprographics and micrographics.

Have students complete an employment application form requiring both printed and handwritten information.

Have FBLA members, in writing, invite a resource person to speak to the class or at an FBLA meeting. They should also prepare the publicity and write the thank-you letter.

Have students write an article for the school paper about activities in the office occupations classroom, field trips or the FBLA chapter events.

Have students write an article about a member of the advisory committee or a cooperative work experience employer.

Have students rotate giving instructions for a simple routine or procedure orally without looking at the person following their directions.

Have a student read a set of instructions aloud and demonstrate the procedure in front of the class such as opening a package of special purpose paper, thinning correction fluid or using correction fluid or paper.

Have students compose a letter on the typewriter in answer to one they received.

Describe a letter you need to mail. Have students compose, type and submit their letters, mailing the best one.

Have five students volunteer to demonstrate different messages to the class through body language (outside the classroom instruct the students to just be themselves). Have the volunteers stand in front of the room for five minutes and instruct the class to write the messages that the volunteers are conveying to them. Discuss the messages that each student has conveyed.

Have the general office clerk duplicate a list of companies with the most jobs available, then have students use telephone directories or library references to complete the addresses. Have the student mail clerk add zip codes to addresses utilizing the zip code directory.

Have students keep a vocabulary note pad handy throughout the term and encourage them to write down the unfamiliar words they encounter while reading along with a definition. Have students keep a "Personal Vocabulary Notebook."

Have students divide into four teams and play "synonym" games using a thesaurus.

Have students solve problems requiring the use of resources such as:

- dictionary
- almanac
- thesaurus
- secretarial handbooks
- atlas
- professional publications
- telephone and zip code directories
- *Oregon Blue Book*

Have students locate the following types of errors on one page of a business report: spelling, punctuation, grammar, capitalization and number usage. Have them correct these using a reference manual.

Have students edit each other's typed letters and sign them if they think the letters are mailable. If they are not mailable, have students use proofreading marks and return for retyping.

Pronounce the names of three people as though you were introducing them and have the students repeat each. This exercise may be extended to include background information about each of the persons being introduced. Check to determine how much information students can repeat.

Read a paragraph from a business letter that contains grammatical errors and then discuss how such errors effect the students' perceptions of the writer.

4. COMPUTATIONAL PROCESSES

Program Goal: Students will be able to solve business problems using computational skills.

Course Goals: Students will be able to:

Computational Skills

4.1 add, subtract, multiply and divide whole numbers.

4.2 compute with fractions, decimals and percentages.

4.3 estimate answers.

4.4 solve practical problems through applications of basic computational skills.

4.5 solve business problems on a 10-key keyboard.

Financial Records

4.6 perform the following bookkeeping functions:

- record transactions
- prepare information for financial records
- retrieve information from financial records
- prepare and maintain payroll records
- record and maintain inventory records
- operate a petty cash fund
- make change
- process accounts payable
- process accounts receivable

4.7 perform the banking functions of a business office:

- deposit funds
- maintain check register
- reconcile accounts

Activities Have students take a diagnostic pre-test.

Have students complete timed exercises of simple addition, subtraction, multiplication and division problems to improve their scores.

Have students construct and participate in games which use mathematics skills, such as puzzles, magic squares and placing the right number in problems to make solutions correct.

Have students practice for FBLA competition in business mathematics.

Have students drill on basic kinds of percentage problems such as:

(a) what percent one number is of another
(b) a number when a certain percent of it is known
(c) the percent of increase or decrease

Have students compute the discount on several items on sale at a department store.

Have students compute the chain discount on items ordered for an FBLA/PBL sales project.

Have students calculate the total of regular and overtime hours recorded on a time card and determine net pay for one week's work from payroll deduction tables.

Have students find the price of several grocery items from two newspapers dated one year apart and compute the percentage of increase or decrease for each item as well as for the total list.

Have students list all the uses of percentage they can find in the previous day's newspaper and list ways business uses the three basic kinds of percentages.

Have students circle an approximate answer on a multiple choice answer sheet to business problems; then have them calculate the problem and compare the two answers.

Have students practice simple business applications using a 10-key calculator, such as compute extensions and discounts, compute net earnings, determine the balance of a customer account after payments and service charges, and compute interest on loans.

5. INFORMATION PROCESSING

Program Goal: Students will be able to perform information processing tasks.

Course Goals: Students will be able to:

Dictation/ Transcription

5.1 take dictation using shorthand, an acceptable alternative or dictation equipment. (S)

5.2 give dictation verbally or with dictation equipment using correct procedures. (S)

5.3 transcribe dictation using transcription equipment or written notes into final document form. (S)

Keyboarding

5.4 use correct keyboarding techniques in the operation of:

- typewriters
- microcomputers
- word processors
- data entry terminals

5.5 operate a 10-key keyboard by touch with acceptable levels of speed and accuracy.

5.6 compose business documents at the keyboard. (S)

5.7 select appropriate format for business documents.

5.8 produce business documents such as:

- business letters and envelopes
- inter/intra-office communications
- minutes and reports of meetings (S)
- cards and labels
- financial, tabulated and miscellaneous reports (S)
- manuscripts
- outlines
- meeting agendas (S)
- itineraries (S)
- pre-printed business forms, such as checks, purchase requisitions, purchase orders, invoices and vouchers
- legal, medical and technical documents

5.9 make corrections on copy by:

- erasing
- applying correction fluid and self-adhesive or paper tapes
- correction tape on typewriter
- correction paper

squeezing and spreading
backspacing and strikeovers on correcting typewriters and word processing equipment
cutting and pasting

5.10 perform routine maintenance of equipment/hardware.

Reprographics

5.11 use effective formatting techniques in all methods of reprographics.

5.12 prepare masters, select appropriate materials, and operate equipment to duplicate materials:

spirit duplicator
mimeograph
heat sensitive duplication (Thermofax)
photocopier
offset

5.13 prepare paste-ups for photocopying.

5.14 collate and staple duplicated materials.

5.15 locate outside printing services available to their office.

5.16 operate microfiche and microfilm reader and printer.

5.17 determine most efficient and cost effective method of reprographics for a particular job. (S)

Information Processing Concepts

5.18 explain that information processing is the interaction of people, equipment and procedures in processing information from ideas into written documents.

5.19 use the vocabulary that relates to information processing such as:

cathode ray tube
punched card
magnetic tape/card
electronic typewriter
display vs. nondisplay
floppy disk
standalone text editor vs. shared logic system
dedicated vs. nondedicated (software-based) system
networking
peripheral devices
phototypesetting

5.20 explain the steps in the information processing cycle:

input
processing
output
reproduction
distribution
storage/retrieval

5.21 explain the applications of information processing:

repetitive communications (form letters)
combined repetitive and variable typing
(financial statements and tabulations)
transcription typing
text preparation and editing
composition

5.22 list and explain careers available in information processing.

Activities Have students invite computer terminal operator, data entry clerk, programmer or systems analyst to speak to the class on training required for each occupation as well as duties, salary ranges and advancement potential.

Have students visit an office that uses an automated data processing system.

Have students diagram the work of data or word processing machines, tracing a document from origin to output.

Have a member of a business advisory committee or CWE employer talk to the class about the role of word processing in his or her business.

Have students plan a field trip to a large word processing center.

Have students develop a glossary of word processing equipment and terminology.

Have FBLA students prepare a bulletin board identifying word processing equipment used in large firms.

Have students decide which duplicator or replicating machine should be used to solve given various problems. Give students experience in spirit duplicating, mimeographing, photocopying and offset duplicating.

Have students use proper copier controls to produce five copies of FBLA correspondence including assembling and collating of materials.

Have students take a pretest and maintain a progress chart for machine operation until they meet a proficiency goal.

Have students compete for certificates of proficiency in machine operation.

Have students practice for the clerk-typist competitive events in regional skills or FBLA conferences.

Have students practice erasing, spreading and squeezing letters, and other correction techniques.

Have students collect samples of business letterheads, envelopes and memo forms from CWE employers and business advisory council members, and prepare a bulletin board display.

Have students type envelopes of various sizes using proper address formats, state abbreviations and special notations such as personal, hold, confidential and special delivery. Have students type envelopes following the trend of abbreviations, no punctuation and all caps.

Have FBLA members type an unarranged treasurer's report containing items with headings.

Have students use a voice-recorded transcriber to type letters inviting CWE employers and advisory committee members to an appreciation banquet for employers.

Have students type and proofread a report requiring a title page, table of contents, subheadings and footnotes.

Have students review and practice making corrections on typewritten copy using various materials such as erasers, correction fluid, correction paper, razor blades and correction tape.

Have several CWE students collect printed forms from their employers or from local business firms, and ask for permission to reproduce these (with a note such as "VOID" or "FOR INSTRUCTIONAL USE ONLY"), for use in classroom activities.

Have students complete several different types of forms using reproductions of forms obtained in the previous activity.

6. GENERAL OFFICE PROCEDURES

Program Goal: Students will be able to follow general office procedures.

Course Goals: Students will be able to:

Mailing and Shipping

6.1 process incoming mail:

- open and sort
- maintain register
- distribute
- read, highlight and annotate

6.2 process outgoing mail:

- fold and insert letters and enclosures in mailing envelopes
- address letters and packages
- wrap and seal packages
- manually stamp and seal envelopes
- forward mail
- insure, register and certify mail
- prepare mailing lists
- operate postage meters and scales
- calculate postal rates
- purchase postage for meters
- process bulk mail
- use U.S. Postal Service manuals
- arrange for freight express, UPS, private mail and fast/overnight mail services
- trace mail

Telecommunications

6.3 use appropriate procedures and voice skills in answering a telephone.

6.4 place local, long distance and conference telephone calls.

6.5 transfer or refer telephone calls to other areas and departments.

6.6 screen telephone calls for employers and supervisors.

6.7 send and receive telegrams, mailgrams and cablegrams.

6.8 place calls with consideration to the time zones of the receivers.

6.9 maintain record of long-distance telephone calls.

6.10 explain trends and changing technologies in telecommunications such as:

- electronic mail
- facsimile
- modems
- teleconferences

Receptionist Techniques and Tasks

6.11 receive and host office visitors.

6.12 provide information to visitors.

6.13 screen visitors for personal meetings with business staff.

6.14 introduce visitors to office staff.

6.15 assist visitors to appropriate locations in office area.

6.16 make pre- and post-meeting and conference arrangements. (S)

6.17 maintain visitor log.

6.18 order and maintain supplies for the office.

6.19 receive and deliver business messages for the staff.

6.20 maintain a positive relationship with visitors.

6.21 arrange guided tours for visitors.

6.22 maintain a clean and orderly reception area.

6.23 handle crisis situations that arise in the office:

- emergencies
- irate customers
- security

6.24 explain the logistics of the office:

- staff assignments and responsibilities
- resources available to the office

Records Management

6.25 explain common methods of records storage:

- electronic
- microfiche
- microfilm

6.26 establish, supervise and/or maintain files.

6.27 establish and/or maintain filing systems:

- alpha/numeric
- geographic
- subject

6.28 process, sort and file business records according to the records management system:

- standard documents
- computer printout records
- computer tape records
- magnetic media
- microfiche and microfilm

6.29 handle classified and confidential files.

6.30 retrieve needed information from files.

6.31 administer charge-out procedures for files.

6.32 establish and/or maintain cross-reference listings.

6.33 maintain security on confidential files.

6.34 merge and/or revise files.

6.35 apply procedures for purging of files:

- transferral of records from active to inactive files
- disposal of unneeded records

6.36 supervise the maintenance of decentralized files.

Activities Have students listen to 10 tape recorded telephone calls and write a message to be left for the personnel director who is out of town, such as an invitation to be a guest speaker at the local FBLA employer's appreciation banquet.

Have a local telephone company representative speak to the class and demonstrate the business phone trainer, preferably one which has three or more incoming lines and an intercom system.

Simulate situations where students practice receiving visitors, maintaining a record of office visitors, giving business information to visitors, screening and assisting visitors, making appropriate introductions, delivering messages and conducting tours of the work place.

Have an insurance underwriter or claim agent discuss how a CRT is used to retrieve stored information about policyholders (other occupational areas may be used).

Have students list reasons why a business needs to maintain files and discuss what would happen if it did not.

Have students visit a large file center such as city or state archives to learn about the importance of files, and the problems and procedures of maintaining them. Have students inquire about the file retention and disposal system at the center.

Have students arrange and conduct individual visits to legal, medical, insurance and other types of offices to examine the filing equipment and interview file clerks about their careers.

Have students understand the advantages and disadvantages of centralized and decentralized filing systems.

Have students type cards and file them in alphabetic, numeric or geographic order using a mailing list that is not in order.

Have CWE students discuss procedures to follow when looking for a misfiled letter or a lost document.

Have students memorize filing vocabulary indexing rules; then test for filing terminology and indexing rules. Ultimately, test for finding and retrieving of information.

7. MAKING BUSINESS ARRANGEMENTS

Program Goals: Students will be able to arrange appointments, meetings, conferences and travel for business staff.

Course Goals: Students will be able to:

7.1 schedule and confirm business appointments and meetings. (S)

7.2 maintain appointment calendars. (S)

7.3 prepare daily appointment schedules. (S)

7.4 cancel and/or reschedule appointments. (S)

7.5 schedule and confirm facilities for meetings and conferences. (S)

7.6 help prepare entertainment plans for receptions, luncheons and dinners. (S)

7.7 prepare and confirm arrangements for meetings and conferences. (S)

7.8 use travel information resources: (S)

- travel agencies
- transportation schedules
- *Official Airline Guide*
- hotel/motel guides

7.9 make travel reservations. (S)

7.10 compile schedules and itineraries. (S)

7.11 prepare and secure travel advances and traveler's checks. (S)

7.12 make teleconference arrangements. (S)

Activities Have students arrange a parlimentary procedures demonstration contest among the student organizations.

Have students take a field trip to a group at which parlimentary procedure is used such as Rotary Club, School Board, State Legislature or American Legion.

Simulate an actual conference that students must plan and carry out.

Have students prepare an itinerary of a trip that their class would like to take.

Have a student explain to the class how to use the *Official Airline Guide* and hotel/motel guides.

8. WORK ENVIRONMENT

Program Goal: Students will be able to establish and maintain an appropriate work environment.

Course Goals: Students will be able to:

8.1 understand the requirements of a productive office environment.

8.2 set up appropriate personal work stations.

8.3 arrange work schedules to enhance the work environment including time for lunch, breaks and work-related errands.

8.4 work safely in an office environment.

Activities Have students summarize newspaper or magazine articles on the effect of sound in an office. Have students discuss the effects of office arrangement and furniture on worker concentration and performance.

Have student FBLA committee prepare a bulletin board or poster illustrating safety instructions.

Have cooperative work experience students report on the safety aspects of the business machines they use at work.

Assign a student committee to identify hazards in the clerical office classroom and propose ways to minimize risks.

Have the students complete the Office Safety Conscious activities in the "Vocational Business Education Cluster Safety Manual" available from the Department of Education.

CURRICULUM ANALYSIS MATRIX

The following matrix is provided to help instructors readily identify the goals for each course in the office occupations program. Both goals and course titles may be reworded to more accurately reflect the priorities of individual programs.

Beside each goal, mark the course or courses in which the goal is being presented by checking the appropriate box. When the matrix is complete, instructors can scan across the chart to find all the courses that present a particular goal. Similarly, a look down the chart will itemize all the goals presented in each course.

Through this process, local districts can determine whether concepts are being omitted or unnecessarily duplicated within the curriculum. At the same time, an instructor may obtain a list of course goals for any given course by extracting those goals checked in that column.

CURRICULUM ANALYSIS MATRIX

(C) Clerical only
(S) Secretarial only
All others are common to both Clerical and Secretarial

Course Goals	*Courses Offered*	*Office Procedures*	*Office Machines*	*Business Communications*	*Bookkeeping/Accounting I*	*Accounting II*	*Shorthand I*	*Shorthand II*	*Typing*									
1. CAREER DEVELOPMENT																		
Career Planning																		
1.1 Self-inventory																		
1.2 Career ladders																		
1.3 Career/job analysis																		
1.4 Career decision making																		
1.5 Entrepreneurial opportunities																		
Job Seeking																		
1.6 Where to search																		
1.7 Resume/data sheet																		
1.8 Letter of application																		
1.9 Attire and grooming																		
1.10 Application forms																		
1.11 Testing																		
1.12 Interviewing skills																		
1.13 Legal aspects of hiring/employee/employer rights																		
Job Retention and Growth																		
1.14 Self-evaluation																		
1.15 Job evaluation																		
1.16 Compatibility of career with personal goals																		
1.17 Job performance appraisals																		
1.18 Keeping current through education																		
2. HUMAN RELATIONS																		
Personal Traits																		
2.1 Acceptable grooming/hygiene																		
2.2 Work habits:																		
a. Time management																		
b. Work flow management (organization of work)																		
c. Punctuality																		
d. Regular attendance																		

CURRICULUM ANALYSIS MATRIX

Course Goals	Courses Offered: Office Procedures	Office Machines	Business Communications	Bookkeeping/Accounting I	Accounting II	Shorthand I	Shorthand II	Typing										
e. Thoroughness																		
f. Teamwork																		
g. Neatness																		
h. Initiative																		
i. Self-evaluation																		
Work Attitudes																		
2.3 Positiveness																		
2.4 Job stress and conflict																		
2.5 Promote positive business image toward client																		
2.6 Respect for authority																		
2.7 Respect for property																		
2.8 Respect for co-workers																		
2.9 Acceptance and giving of constructive suggestions and praise																		
2.10 Acceptance of the results of performance appraisals																		
2.11 Ethics:																		
a. Honesty																		
b. Loyalty																		
c. Confidentiality																		
2.12 Originator skills																		
2.13 Ability to cope with change																		
3. COMMUNICATIONS																		
Language Skills																		
3.1 Punctuate/capitalize correctly																		
3.2 Spelling rules																		
3.3 Correct grammar usage																		
3.4 Divide words correctly																		
3.5 Business vocabulary																		
3.6 Number usage																		
3.7 Handwriting																		

CURRICULUM ANALYSIS MATRIX

Course Goals	Courses Offered: Office Procedures	Office Machines	Business Communications	Bookkeeping/Accounting I	Accounting II	Shorthand I	Shorthand II	Typing										
3.8 Reference resources:																		
a. Thesaurus																		
b. Secretarial handbooks																		
c. Zip Code Directory and other postal information																		
d. Almanac																		
e. Atlas																		
f. Professional/trade publications																		
g. Company handbooks or procedures manuals																		
h. Telephone directory																		
i. *Oregon Blue Book* and related government/ public resources																		
j. Catalogs																		
k. Library																		
l. Equipment manuals																		
Basic Verbal/Non-verbal Skills																		
3.9 Read with speed and comprehension																		
3.10 Write letters, memorandums and reports																		
3.11 Speak in meetings & discussions																		
3.12 Listen effectively																		
3.13 Non-verbal communications:																		
a. Body language																		
b. Voice inflection																		
Proofreading and Editing																		
3.14 Use of proofreading marks																		
3.15 Ability to find errors in typing, grammar, spelling and work usage																		
3.16 Editing/revising																		
4. COMPUTATIONAL PROCESSES																		
Computational Skills																		
4.1 Basic computational skills (add, subtract, multiply and divide)																		

CURRICULUM ANALYSIS MATRIX

Course Goals	Courses Offered: Office Procedures	Office Machines	Business Communications	Bookkeeping/Accounting I	Accounting II	Shorthand I	Shorthand II	Typing										
4.2 Fractions, decimals and percentages																		
4.3 Estimate answers																		
4.4 Problem solving																		
4.5 Solve business problems using a 10-key keyboard																		
Financial Records																		
4.6 Perform bookkeeping functions:																		
a. Record transactions																		
b. Prepare information for financial records																		
c. Retrieve information from financial records																		
d. Prepare and maintain payroll records																		
e. Record and maintain the inventory records																		
f. Operate the petty cash fund																		
g. Make change																		
h. Process accounts payable																		
i. Process accounts receivable																		
4.7 Perform banking functions:																		
a. Deposit funds																		
b. Maintain check register																		
c. Reconcile accounts																		
5. INFORMATION PROCESSING																		
Dictation/Transcription																		
5.1 Take dictation (S)																		
a. Shorthand or acceptable alternative																		
b. Dictation equipment																		
5.2 Give dictation (S):																		
a. Personal contact																		
b. Dictation equipment																		
5.3 Transcribe dictation into final document form (S):																		
a. Transcription equipment																		
b. Written notes																		

CURRICULUM ANALYSIS MATRIX

Course Goals / Courses Offered	Office Procedures	Office Machines	Business Communications	Bookkeeping/Accounting I	Accounting II	Shorthand I	Shorthand II	Typing										
Keyboarding																		
5.4 Use correct keyboarding techniques to operate:																		
a. Typewriters																		
b. Microcomputers																		
c. Word processors																		
d. Data entry terminals																		
5.5 Operate 10-key keyboard by touch																		
5.6 Compose at the keyboard (S)																		
5.7 Select appropriate format for business documents																		
5.8 Produce business documents:																		
a. Business letters and envelopes																		
b. Inter/intra-office communications																		
c. Minutes or reports of meetings (S)																		
d. Cards and labels																		
e. Financial, tabulated and miscellaneous reports (S)																		
f. Manuscripts																		
g. Outlines																		
h. Meeting agendas (S)																		
i. Itineraries (S)																		
j. Preprinted business forms																		
k. Legal, medical and technical documents																		
5.9 Make corrections by:																		
a. Erasing																		
b. Applying correction fluid and self-adhesive or paper tapes																		
c. Correction tape on typewriter																		
d. Correction paper																		
e. Squeezing and spreading																		
f. Backspacing and strikeovers, on correcting typewriters and word processing equipment																		
g. Cutting and pasting																		

CURRICULUM ANALYSIS MATRIX

Course Goals / Courses Offered	Office Procedures	Office Machines	Business Communications	Bookkeeping/Accounting I	Accounting II	Shorthand I	Shorthand II	Typing									
5.10 Perform routine maintenance of equipment																	
Reprographics																	
5.11 Use effective formatting techniques																	
5.12 Prepare masters, select materials and operate duplication equipment:																	
a. Spirit duplicator																	
b. Mimeograph																	
c. Heat sensitive duplication (Thermofax)																	
d. Photocopier																	
e. Offset																	
5.13 Prepare paste-ups for photocopying																	
5.14 Collate and staple duplicated materials																	
5.15 Locate outside printing services																	
5.16 Operate microfilm and microfiche reader and printer																	
5.17 Determine most efficient and cost effective method (S)																	
Information Processing Concepts																	
5.18 Define information processing																	
5.19 Information processing vocabulary:																	
a. Cathode ray tube																	
b. Punched card																	
c. Magnetic tape/card																	
d. Electronic typewriter																	
e. Display vs. nondisplay																	
f. Floppy disk																	
g. Stand alone text editor vs. shared logic system																	
h. Dedicated vs. nondedicated system																	
i. Networking																	
j. Peripheral devices																	
k. Phototypesetting																	

CURRICULUM ANALYSIS MATRIX

Course Goals	Courses Offered: Office Procedures	Office Machines	Business Communications	Bookkeeping/Accounting I	Accounting II	Shorthand I	Shorthand II	Typing										
5.20 Understand steps in information processing:																		
a. Input																		
b. Processing																		
c. Output																		
d. Reproduction																		
e. Distribution																		
f. Storage/retrieval																		
5.21 Applications of information processing:																		
a. Repetitive communications																		
b. Combined repetitive and variable typing																		
c. Transcription typing																		
d. Text preparation and editing																		
e. Composition																		
5.22 Information processing careers																		
6. GENERAL OFFICE PROCEDURES																		
Mailing and Shipping																		
6.1 Process incoming mail:																		
a. Open and sort																		
b. Maintain register																		
c. Distribute																		
d. Read, highlight and annotate																		
6.2 Process outgoing mail:																		
a. Fold and insert letters and enclosures in mailing envelopes																		
b. Address letters and packages																		
c. Wrap and seal packages																		
d. Manually stamp and seal envelopes																		
e. Forward mail																		
f. Insure, register and certify mail																		
g. Prepare mailing lists																		
h. Operate postage meters and scales																		

CURRICULUM ANALYSIS MATRIX

Course Goals	Courses Offered: Office Procedures	Office Machines	Business Communications	Bookkeeping/Accounting I	Accounting II	Shorthand I	Shorthand II	Typing											
i. Calculate postal rates																			
j. Purchase postage for meters																			
k. Process bulk mail																			
l. Use U. S. Postal Service manuals																			
m. Arrange for freight express, UPS, private mail and fast/overnight mail services																			
n. Trace mail																			
Telecommunications																			
6.3 Answer the telephone (procedures and voice skills)																			
6.4 Place local, long-distance and conference telephone calls																			
6.5 Transfer or refer telephone calls																			
6.6 Screen employer's/supervisor's calls																			
6.7 Send and receive telegrams, mailgrams and cablegrams																			
6.8 Know official time zone designations																			
6.9 Maintain record of long-distance calls																			
6.10 Trends and changing technologies in telecommunications:																			
a. Electronic mail																			
b. Facsimile																			
c. Modems																			
d. Teleconferences																			
Receptionist Techniques and Tasks																			
6.11 Receive and host office visitors																			
6.12 Provide information to visitors																			
6.13 Screen visitors																			
6.14 Make introductions																			
6.15 Assist visitors to proper location within office																			
6.16 Make pre- and post-meeting and conference arrangements (S)																			

CURRICULUM ANALYSIS MATRIX

Course Goals	Courses Offered: Office Procedures	Office Machines	Business Communications	Bookkeeping/Accounting I	Accounting II	Shorthand I	Shorthand II	Typing										
6.17 Maintain visitor log																		
6.18 Order and maintain supplies																		
6.19 Receive and deliver business messages																		
6.20 Maintain a positive relationship with visitors																		
6.21 Arrange guided tours for visitors																		
6.22 Maintain reception area																		
6.23 Undertake crisis management duties:																		
a. Emergencies																		
b. Irate customers																		
c. Security																		
6.24 Explain office logistics:																		
a. Staff assignments and responsibilities																		
b. Resources available to the office																		
Records Management																		
6.25 Explain records storage:																		
a. Electronic																		
b. Microfiche																		
c. Microfilm																		
6.26 Establish, supervise and/or maintain files																		
6.27 Establish and/or maintain the filing system:																		
a. Alpha/numeric																		
b. Geographic																		
c. Subject																		
6.28 Process, sort, and file business records according to the system:																		
a. Standard documents																		
b. Computer printout records																		
c. Computer tape records																		
d. Magnetic media																		
e. Microfiche and microfilm																		
6.29 Handle classified and confidential files																		
6.30 Retrieve needed information from files																		

CURRICULUM ANALYSIS MATRIX

Course Goals	Office Procedures	Office Machines	Business Communications	Bookkeeping/Accounting I	Accounting II	Shorthand I	Shorthand II	Typing										
6.31 Administer charge-out procedure for files																		
6.32 Establish and/or maintain cross reference listing																		
6.33 Maintain security on confidential files																		
6.34 Merge and/or revise files																		
6.35 Apply procedures for purging of files:																		
a. Transferral of records from active to inactive files																		
b. Disposal of unneeded records																		
6.36 Supervise the maintenance of decentralized files																		
7. MAKING BUSINESS ARRANGEMENTS																		
7.1 Schedule and confirm business appointments and meetings (S)																		
7.2 Maintain appointment calendars (S)																		
7.3 Prepare daily appointment schedules (S)																		
7.4 Cancel and/or reschedule appointments (S)																		
7.5 Schedule and confirm facilities for meetings and conferences (S)																		
7.6 Help prepare entertainment plans, receptions, luncheons and dinners (S)																		
7.7 Prepare and confirm arrangements for meetings and conferences (S)																		
7.8 Use travel information sources (S):																		
a. Travel agencies																		
b. Transportation schedules																		
c. *Official Airline Guide*																		
d. Hotel/motel guides																		
7.9 Make travel reservations (S)																		
7.10 Compile schedules and itineraries (S)																		
7.11 Prepare and secure travel advances and traveler's checks (S)																		

CURRICULUM ANALYSIS MATRIX

Course Goals	Courses Offered: Office Procedures	Office Machines	Business Communications	Bookkeeping/Accounting I	Accounting II	Shorthand I	Shorthand II	Typing										
8. WORK ENVIRONMENT																		
8.1 Productive office environment requirements																		
8.2 Setting up your personal work station																		
8.3 Work schedules:																		
a. Lunch																		
b. Breaks																		
c. Work related errands																		
8.4 Office safety																		

CURRICULUM ANALYSIS MATRIX

Course Goals	Courses Offered: Office Procedures	Office Machines	Business Communications	Bookkeeping/Accounting I	Accounting II	Shorthand I	Shorthand II	Typing										

STUDENT ASSESSMENT

STUDENT ASSESSMENT

Assessment is critical to sound instructional planning. Once a school and its community reach an understanding of what schooling is to accomplish (once goals and graduation requirements are set), there is a need to know whether such outcomes are being reached.

In the Goal-Based Planning for Office Occupations Programs section of this guide, four sets of desired outcomes were identified: state goals, district goals, program goals and course goals.

Once instructional plans are implemented, the instructor must pose the question: Are students attaining desired outcomes, and is the office occupations program helping them to reach those outcomes? The quality of the answers to these questions depends on how well assessment activities are designed and carried out.

Assessment activities involve both group and individual approaches: how well students learn as a group helps determine the course of the program; how well students learn individually helps instructors map out teaching strategies.

The interrelationship is shown below. Assessment of each of the elements shown in the figure will provide answers to particular kinds of questions.

District goal assessment answers the question: To what extent are students attaining the outcomes of schooling desired by the community and its schools?

Program goal assessment answers the question: To what extent are students attaining the outcomes office occupations teachers and curriculum planners desire?

Assessment of course goals determines to what extent students are attaining the outcomes required for Typing II.

Competency assessment determines to what extent students can apply what they have learned in order to graduate.

Assessment of personal goals determines to what extent students are attaining those outcomes designated as of greatest personal importance, needs or interest.

Assessment of the students' strengths and weaknesses identifies the individual characteristics that effect their performance and progress toward goals.

In all of these assessment areas, student performances serve as indicators of attainment of desired outcomes. Assessment might involve several of the following approaches:

Third party assessment (teachers, parents, educators, advisory committees)
Administrative assessment
Student assessment of the program, instruction and the level of personal satisfaction
Use of student monitoring data
Student pretest and post-test to determine student growth
Student follow-up study
Survey questionnaire
An office occupations assessment/planning guide to assess these components:

- program design and long-range plan
- advisory committee involvement
- staffing

facilities, equipment, materials and supplies
curriculum instructional approaches
individual student approaches
cooperative work experience
vocational student organization
evaluation techniques
school and community relations

The *Elementary-Secondary Guide for Oregon Schools, 1980: Standards for Public Schools* (Salem: Oregon Department of Education, 1980) describes what is required of schools in the area of assessment. In addition, *Standards Guidelines: Goal-Based Planning* will provide suggestions for schools toward fulfilling state requirements.

APPENDIXES

A. Oregon Manpower Data

B. Key Occupation Job Descriptions

C. Facilities, Equipment and Supplies

D. Office Occupations Skills Record

APPENDIX A

OREGON MANPOWER DATA
OR
OFFICE OCCUPATIONS

The following information was collected through the Occupational Employment Statistics (OES) program of the Employment Division.

Key Clerical Occupation	Base Year 1980	Current Est. Employ. 1983	Ave. Annual Job Openings*
File Clerk	3,898	4,109	70
General Clerk	21,403	22,671	423
Mail Clerk	1,035	1,048	4
Typist	12,242	12,872	210
Peripheral Equipment Operator	198	208	3
Switchboard Operator	1,695	1,811	39
Secretary	26,379	27,733	451

*The employment estimates represent wage and salary workers. Average annual job openings include projected growth in the occupation. Normal turnover is not included in the average job openings estimates.

Three of the occupation titles listed are not discreetly identified in the OES program. Clerk typist, typist-terminal operator and word processing operator are all included in the employment estimates for "typist."

APPENDIX B

KEY OCCUPATION JOB DESCRIPTIONS

Following are the job descriptions of key occupations around which this curriculum guide was developed:

D.O.T.* No. 219.362-010; Clerk, General Office
O.E.S.** No. 61333; General Clerk
C.I.P.*** No. 07070100; Typing and General Office

Duties may be assigned in accordance with the office procedures of individual establishments and may include a combination of bookkeeping, typing, stenography, office machine operation, etc.

D.O.T. No. 209.587-026; Clerk, Mail
O.E.S. No. 61343; Mail Clerk
C.I.P. No. 0707060C; Mail and Order Clerks

Receives, prepares, records and/or transmits incoming, outgoing or internal mail.

D.O.T. No. 203.362-010; Clerk Typist
O.E.S. No. 61392; Typist
C.I.P. No. 07070200; Clerk Typist

Types letters, reports, stencils, forms, addresses or other straight-copy material from rough draft or corrected copy. May perform other clerical duties as assigned.

D.O.T. No. 206.367-014; Clerk, File
O.E.S. No. 61330; File Clerk
C.I.P. No. 07070100; Typing and General Office

Files correspondence, cards, invoices, receipts and other records in alphabetical or numerical order, or according to the filing system used. Locates and removes material from files when requested. May be required to classify and file new material.

D.O.T. No. 213.382-010; Data Entry Clerk (Peripheral EDP Equipment Operator)
O.E.S. No. 61109; Peripheral Equipment Operator
C.I.P. No. 07030300; Data Entry Equipment Operator

Operates on-line or off-line peripheral machines, according to instructions, to transfer data from one form to another, print output and read data into and out of electronic computer.

D.O.T. No. 235.662-022; Receptionist-Switchboard Operator
O.E.S. No. 61376; Switchboard Operator
C.I.P. No. 07070700; Receptionist and Communications

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*Dictionary of Occupational Titles, 4th Edition (1977) U.S. Department of Labor
**Oregon Occupational Employment Statistics Number
***Classification of Instructional Programs

In addition to performing duties of switchboard operator, acts as receptionist and may also type or perform routine clerical work as part of regular duties.

D.O.T. No. 203.582-054; Typist - Terminal Operator
O.E.S. No. 61392; Typist
C.I.P. No. 07070200; Clerk Typist

Operates a keypunch machine to record or verify alphabetic and/or numeric code onto cards, disk or tape.

D.O.T. No. 202.362-500; Word Processing Operator
O.E.S. No. 61392; Typist
C.I.P. No. 07070200; Typing and General Office

Keeps records of incoming work. May do graphics, e.g., illustrations, charts and title pages. Performs various typing duties.

D.O.T. No. 201.362-030; Secretary
O.E.S. No. 61368; Secretary
C.I.P. No. 07060600; Secretarial

Performs all basic clerical functions, takes dictation and transcribes, composes and routes correspondence, etc., depending on requirements of job site.

APPENDIX C

FACILITIES, EQUIPMENT AND SUPPLIES

The following suggestions are given even though such differences as financial ability, proximity to metropolitan areas and enrollment make it difficult to provide the information and help many administrators and teachers often request concerning equipment and facilities for the business education department. However, these suggestions may provide some guidance in this area, especially for departments that are constructing and equipping new facilities.

It is important to remain aware of business trends and available jobs, and to provide the facilities and equipment necessary to train students for both current and future job opportunities. Current office layouts should be considered, especially for model offices.

A well-planned office increases productivity and morale. The open plan, combined with office landscaping, creates a pleasant atmosphere that is often better suited to workers' needs. In such a plan, an office is designed with an absence of partitions, using movable furniture arrangements and a profusion of plants, graphics and special lighting designed for office tasks. Although the furniture and storage units are more costly than traditional office equipment, data indicates that construction costs may be as much as 50 percent lower when an office is designed with an open plan.

All rooms in the business education department should be located in the same area, divided one from another and arranged in such a way that is not necessary to go through one room to reach another classroom. These classrooms should be separate from other areas. Floors, walls and ceiling should be constructed of acoustical materials.

Just as a business provides offices for professional staff, a business education department should provide offices where the business instructor(s) can counsel students, file confidential materials, and conduct business activities and conversations. The office should be centrally located in the business education department, easily accessible to all instructors, and large enough to accommodate assigned staff. Approximately 40 square feet per staff member should be allocated. By locating the storage space behind the office, the instructor would have better control of supply inventory and easier access to supplies.

Lighting and Wiring

Adequate wiring and outlets should be installed in each room of the business education department to accommodate an assortment of machines and flexible arrangement. The following figures are given as a guide for installing electrical outlets:

> For rooms utilizing "L"-shaped desks and office arrangements (office procedures, laboratory, COE classroom), approximately every 6 ft.
>
> For rooms utilizing smaller desks and more standard classroom arrangements (typewriting, machines, accounting, etc.), approximately every 4 ft.

Other suggestions:

Provide an underfloor duct system for outlets in any area of the keyboarding/typewriting and office procedures rooms in order to avoid use of long cords. Outlets should not be placed in foot traffic areas.

Cords should be off the floor and wrapped or bundled. Where outlets must be suspended from the ceiling, they should be below desk tops and excess machine cords should be wrapped. Desks should be clustered around electrical outlets.

Provide outlets on all walls for use of electric machines and audiovisual equipment.

Install a master switch in each room of the business education department.

Provide high quality illumination, well-balanced, with minimum glare and with limited shadows. Investigate use of full-spectrum fluorescent lighting.

Provide lighting to exceed normal requirements because of special visual needs such as rapid reading, close attention to detail, and the use of the rooms for evening classes.

Provide control of artificial and natural illumination by the use of blinds, shades, draperies, dimmers and special switches to permit convenient use of visual aids.

Space Needs

The number of business rooms needed depends upon school enrollment, enrollment in business courses, the trends and needs of the local community which affect education for business and compliance with PL 94-142. Allow for wider aisles for wheelchairs.

Using maximum possible enrollment per class, the following spaces are recommended for the business education department:

typewriting	35 sq. ft. per student
office procedures, COE classroom or laboratory	50 sq. ft. per student
bookkeeping/accounting	35 sq. ft. per student
instructor's desk	100 sq. ft. per instructor
storage area (each teaching area)	60 sq. ft.

Each student should be provided with a minimum of 25 square feet of instructional space in each classroom.

Factors to be Considered in Determining the Number of Rooms

Number of students enrolled in business courses, including special-need students.

Number of class sections daily in the school's schedule

Use of rooms for night classes and summer school

Size of each class

Total number of classes each week

Keyboarding/Typewriting Room

Location

Adjacent to and connected by doors with the office procedures room.

Capacity

Large enough to house 32 individual work stations (a work station is defined as one desk with typewriter and one chair).

desk: 20 inches by 40 inches, varying in height from 27 inches up to allow for wheelchair.
chair: Secretarial chair with adjustable back and height.
typewriter: Various makes and models.

Features

A lavatory, or sink in counter, with dispensers for soap and towels.

Advanced Keyboarding/Typewriting Room

Special Equipment

All electric typewriters, if possible.

At least one long-carriage typewriter.

Features

A lavatory, or sink in counter, with dispensers for soap and towels.

General Purpose Typewriting Room

In a secondary school with one business education teacher, it may be necessary to use the typewriting room for shorthand transcription and for office procedures. If this is the situation, the room should also have:

10-key electronic calculator, display and/or printing.
dictation-transcription equipment.
duplicating equipment.
illuminated drawing board.

Features

A lavatory, or sink in counter, with dispensers for soap and towels.

Bookkeeping/Accounting Room

A room used for bookkeeping or accounting instruction should incorporate the general recommendations.

Location

Adjacent to and connected by a door with the office procedures room.

Capacity

Large enough to house 32 individual work stations (a work station is defined as one desk and one chair).

desk: 20 inches by 40 inches with storage space.
chair: secretarial chair with adjustable back and height.

Space equipped for:

teacher's desk
file cabinet
one electronic printing calculator for every five students

Shorthand Room

The room used for shorthand instruction should incorporate the general recommendations.

Location

Adjacent to and connected by a door with the keyboarding/typewriting room.

Capacity

Large enough to house 32 work stations (a work station is defined as one desk and one chair).

desk: 20 inches by 40, varying height 27 to 30 inches.
chair: secretarial chair with adjustable back and height.

Space equipped with:

teacher's desk
file cabinet
lectern or dictation stand
tape recorder and tapes
dictionary for each station
unabridged dictionary
shorthand dictionary
stenographer's reference manual
stop watch
interval timer
typewriters available or in an adjacent room

Office Procedures Room, Business Lab, Model Office

Location

Between the keyboarding/typewriting room and bookkeeping/accounting room, and connected to both.

Capacity

Large enough to house 24 work stations plus three work tables (a work station is defined as one desk or table and one chair).

desk; 40 inches by 40 inches, varying in height or adjustable.
chair: secretarial chair with adjustable back and height.
work table: 24 inches by 72 inches, 30 inches high.

Features

A lavatory, or sink in counter, with dispensers for soap and towels.
A "realistic" office design is suggested.

Space equipped with:

teacher's desk
file cabinets
demonstration stand
information processing equipment with peripheral equipment and software
paper cutter
city, telephone, post office and zip code directories
machines:

- 10 electric typewriters
- 4 transcribing machines
- 2 long-carriage typewriters
- 4 10-key electronic calculators
- 1 stencil duplicator
- 1 photocopier
- 1 illuminated drawing board
- 1 full-length mirror

Work Room

This room should be used for duplicating equipment, small group instruction and supply storage.

Location

Adjacent to and connected by doors with both the keyboarding/typewriting room and office procedures room.

Capacity

Large enough to house six to eight students for specific projects.

Space equipped with:

mimeograph machines
photocopier
work table

Features

Separated from adjoining rooms with partially glassed partitions for ease of supervision.

A lavatory, or sink in counter, with dispensers for soap and towels.

Other Considerations

- The building and the program should be readily accessible to handicapped persons, including ramps, building entrances, doors and doorways, stairs, floors, lavatories, telephones, elevators and water fountains which meet the provisions for the handicapped as outlined in Public Law 94-142. Likewise, switches and controls for lights, heating, ventilation, window draperies, fire alarms and all similar controls shall be placed within the reach of all individuals.

- Maintenance contracts and replacement schedule should exist for repair and replacement of equipment.

- Before purchasing equipment, the department should check to see if services on the equipment will be available and prompt.
- An advisory committee should help the business and office education department determine equipment needs for training in business education.
- Students should practice safety procedures such as operating fire extinguishers and evacuating the building.

APPENDIX D

OFFICE OCCUPATIONS SKILLS RECORD

Upon completion of an office occupations program, each student should have a completed record to verify to prospective employers that entry-level skills have been achieved. This record may be used to verify achievement when a student is moving to different levels of a program, transferring to another school, or attending a community college.

The following skills record is organized to document the student's performance. The skills and traits listed were developed by analyzing a variety of occupations within the clerical and secretarial clusters. Students should be given information about the kind of performance and the level of performance expected before they are evaluated. Upon satisfactory completion of the activity, the teacher or employer can initial and/or date the appropriate level of performance achieved.

The choice and number of required performance measures should be related to the student's career objective. Students should be encouraged to achieve whatever rating is necessary for success in their stated career goals.

The form included in this guide may be used for printing multiple copies. Schools may adopt the format as presented or revise and adapt the format and wording to meet local needs.

Please Note: ***The skills record master copy included in this section is a temporary draft which is scheduled to be revised by the summer of 1984. The new Office Occupations Vocational Skills Record will combine skills in the Accounting, Clerical and Secretarial Clusters into one record, yet delineate between common skills and those specific to each cluster program.***

SPECIFIC CAREER COURSES, SUBJECTS, OR BLOCKS OF TRAINING RELATED TO STUDENT'S CAREER OBJECTIVE

Courses or Blocks of Training	Date Completed

EDUCATIONAL CAREER OBJECTIVE

Career Objective	Date

RECORD OF OFFICE WORK EXPERIENCE

(S = Supervised U = Unsupervised)

Kind of Work	S	U	Beginning Date	Ending Date	Firm or Individual	Address of Business

OFFICE OCCUPATIONS VOCATIONAL SKILLS RECORD

For Clerical Cluster and Secretarial Cluster

DIVISION OF VOCATIONAL EDUCATION
OREGON DEPARTMENT OF EDUCATION
700 PRINGLE PARKWAY SE
SALEM, OREGON 97310

DRAFT: January 1981

The list of vocational skills/traits was developed from the task analyses of the key occupations in the clerical cluster and the secretarial cluster.

LEVEL CODE KEY: (no mark means student has had no exposure to task or does not possess trait)

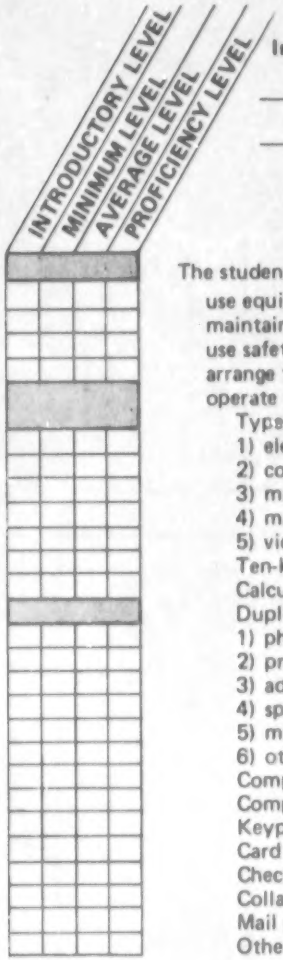
Introductory Level Can do simple parts of task. Needs to be told/shown how to do most of the task. Needs extremely close supervision.

Minimum Level Can do most parts of the task. Needs help only with most difficult parts. Needs close supervision.

Average Level Can do all parts of task. Needs only spot-check of completed work. Meets local demands for speed and accuracy. Needs moderate job entry supervision.

Proficiency Level Can complete task quickly and accurately. Can direct others in how to do the task. Needs little supervision.

Directions: The instructor may write date and initial in appropriate square.



Instructor's Name **Initials** **Year**

_____

_____

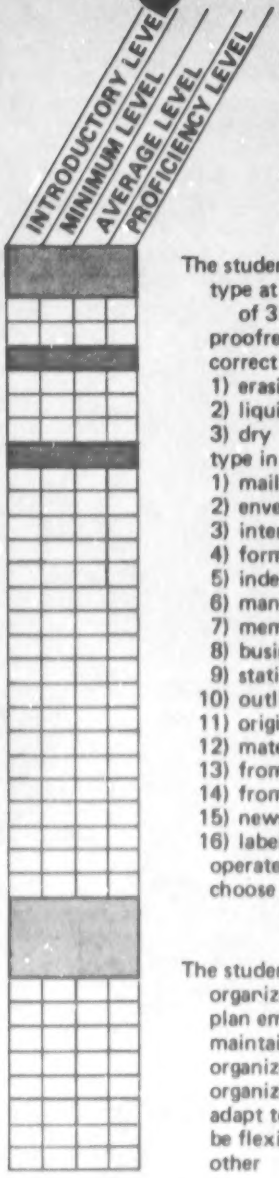
BUSINESS MACHINES

The student can

- use equipment instruction manuals
- maintain equipment in good condition
- use safety precautions
- arrange for servicing equipment
- operate the following business machines:
  - Typewriters: standard or Dvorak keyboard
    1) electric
    2) correcting electric
    3) manual
    4) magnetic keyboard
    5) video screen
  - Ten-key adding machine (listing/nonlisting)
  - Calculator (electronic/nonelectronic)
  - Duplicating equipment:
    1) photocopy
    2) printing
    3) addressing
    4) spirit duplicator
    5) mimeograph
    6) other _____
  - Computer
  - Computer on-line equipment (CRT)
  - Keypunch/coding equipment
  - Card sorter
  - Check protectographs
  - Collating
  - Mail processing machines
  - Other _____

HONORS - AWARDS - POSITIONS HELD

OUT-OF-SCHOOL ACTIVITIES: e.g., HOBBIES, CIVIC, COMMUNITY



TYPEWRITING

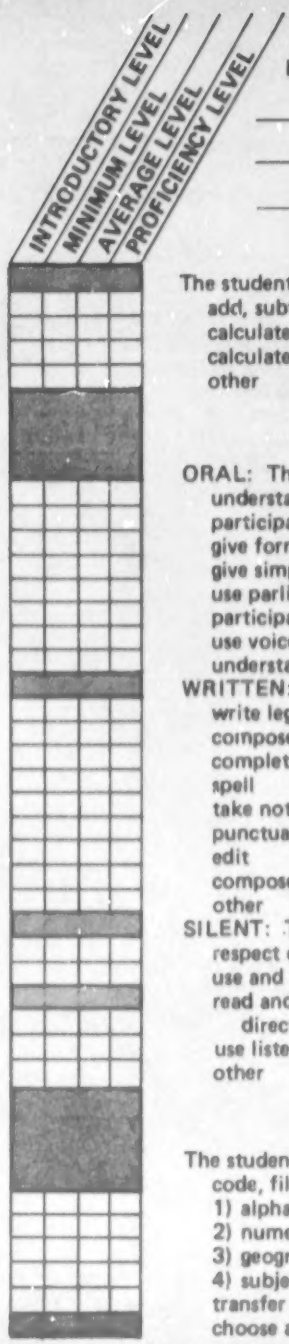
The student can
- type at ____ words a minute (3 minutes, 5 error cut off, average of 3 takes)
- proofread typewritten material
- correct errors by appropriate method for original and copies
  1) erasing
  2) liquid
  3) dry
- type in acceptable form:
  1) mailable letters
  2) envelopes (folds and inserts letters)
  3) interoffice correspondence
  4) forms
  5) index cards
  6) manuscripts
  7) memos
  8) business reports
  9) statistical tables
  10) outlines
  11) originals for duplication
  12) materials for display
  13) from corrected typed copy
  14) from handwritten copy
  15) newspaper notice
  16) labels
- operate word-processing systems
- choose the appropriate style for the kind of document typed

WORK ORGANIZATION AND PLANNING

The student can
- organize time and work and needs for self
- plan employer's job needs
- maintain work station
- organize work in priority order
- organize and report data
- adapt to new situations
- be flexible to meet unexpected situations
- other _____

Instructor Note: Recording achieved levels above the minimum level may enable students to accept positions of greater responsibility and may permit additional advanced placement at the postsecondary level.

IMPORTANT: Recommended changes in format, line items, or interpretation should be forwarded to: Lola B. Wager, Business and Office Education Specialist, Oregon Department of Education, Salem, Oregon 97310.



CWE Supervisors

Name	Initials	Year

BUSINESS MATHEMATICS

The student can
- add, subtract, multiply and divide (fractions and decimals)
- calculate percentages: 3 basic kinds of problems
- calculate basic business problems, e.g., interest, mark-ups, discounts
- other _____

COMMUNICATION

ORAL: The student can
- understand and verify instructions
- participate in a job interview
- give formal and informal reports
- give simple instructions to another worker
- use parliamentary procedures
- participate in feedback
- use voice effectively on the telephone
- understand and use business vocabulary

WRITTEN: The student can
- write legibly
- compose simple memos or letters
- complete forms
- spell
- take notes and/or minutes of meeting
- punctuate
- edit
- compose letter of application and resume
- other _____

SILENT: The student can
- respect others' need for quiet
- use and translate body language
- read and understand written instructions, e.g., office manuals, directives
- use listening skills
- other _____

FILING

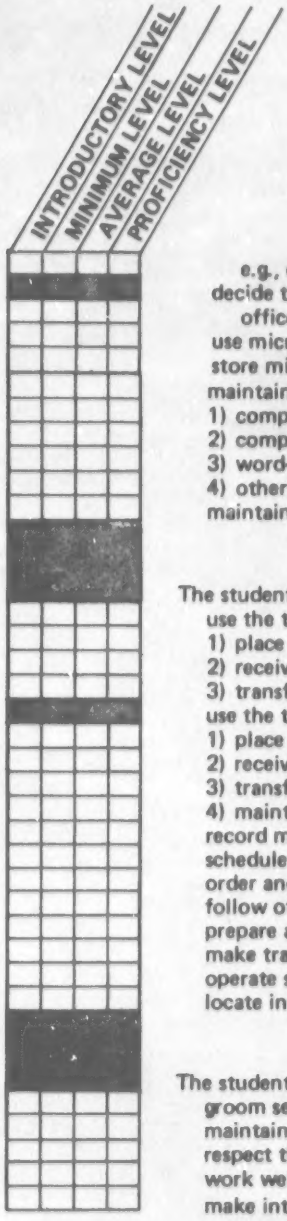
The student can
- code, file, and retrieve records by the following systems:
  1) alphabetic
  2) numeric
  3) geographic
  4) subject
- transfer and store records according to established procedures
- choose and use correct system for filing different materials.

STUDENT _____ _____

SCHOOL YEAR(S) _____

INSTRUCTOR _____

INSTRUCTOR _____



FILING (continued)

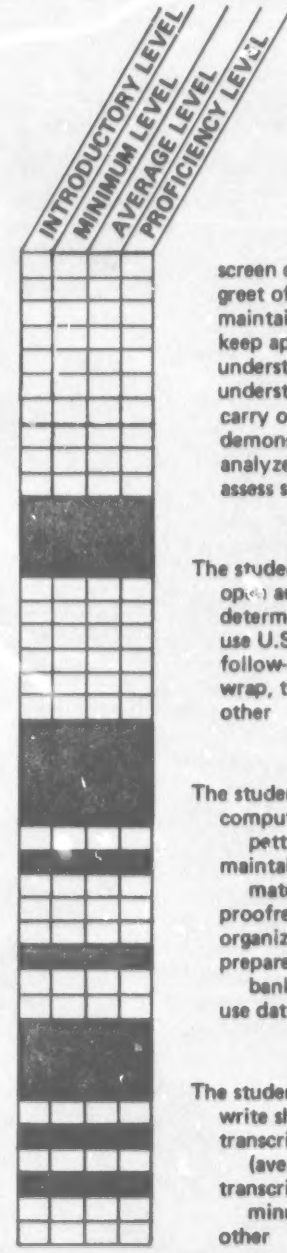
e.g., cards, clippings, documents, paintings, catalogues, etc.
decide the systems best suited for filing according to type of office, e.g., legal, medical, insurance, auto parts
use microfiche equipment
store microfiche records
maintain files according to types of records
1) computer printout records
2) computer tape records
3) word-processing records
4) other records _____
maintain log or register

GENERAL OFFICE PROCEDURES

The student can
use the telephone for local calls including
1) place calls
2) receive calls
3) transfer calls
use the telephone for long-distance calls including:
1) place calls
2) receive calls
3) transfer calls
4) maintain cost information
record messages
schedule appointments
order and maintain supplies
follow office routines (including safety)
prepare and fill in forms
make travel arrangements
operate switchboard/call director
locate information in reference books

HUMAN RELATIONS

The student can
groom self and dress for business situations
maintain a businesslike attitude and behavior while at work
respect the time and property of others
work well with authority, co-workers and clients
make introductions



HUMAN RELATIONS (continued)

screen callers or calls
greet office callers
maintain attendance record
keep appointments on time
understand the need for loyalty
understand need to keep certain information private
carry out a job to completion
demonstrate commitment to healthful living
analyze direction of career goal, consider alternate routes
assess self abilities and disabilities, and personal development

MAIL PROCESSING

The student can
open and process incoming mail
determine correct postage and process outgoing mail
use U.S. Postal Manual
follow-up lost mail items
wrap, tie or seal packages
other _____

RECORD KEEPING

The student can
compute and maintain simple records such as inventory or petty cash
maintain usual office record-keeping systems such as time, material or cost records
proofread, maintain accuracy and make neat corrections
organize work and keep neat records
prepare bank deposits, maintain checkbook and reconcile bank statement
use data processing systems

SHORTHAND AND TRANSCRIPTION

The student can
write shorthand at ____ words a minute (average of 3 takes)
transcribe from shorthand notes at ____ words a minute (average of 3 takes)
transcribe from voice recording equipment at ____ words a minute (average of 3 takes)
other _____

CURRICULUM GUIDE for OFFICE OCCUPATIONS

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PLEASE RESPOND so that your views can be considered as we plan future publications. Simply cut out the form, fold and mail it back to us. We want to hear from you!

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___ More than half
___ Less than half
___ Just skimmed

Does this publication fulfill its purpose as stated in the preface or introduction?

___ Completely
___ Partly
___ Not at all

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___ Sometimes
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___ In general, yes
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___ Fairly easy
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